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Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Case Lookup course.

As a reminder, you may view the slide number you are on by clicking on the moving cursor. Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link: http://www.cms.gov/WorkersCompAgencyServices/.

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Slide notes

This course explains the WCMSAP Case Lookup feature which gives WCMSAP users the ability to view a previously submitted Workers' Compensation Medicare Set-Aside (WCMSA) case or a work-in-progress (WIP) case

that was submitted/entered through the WCMSAP Web portal. This course also explains how to submit a request to CMS to re-review a case.

For more information on these user roles, please see the "WCMSAP Basic Functions for Account Managers" and/or the "WCMSAP Basic Functions for Account Designees" CBTs.

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As a WCMSAP user you will either be an Account Manager or an Account Designee. If you are a self-submitter, you are the Account Manager and will not have any Account Designees.

If you are a corporate or representative submitter you will select your Account Manager who in turn will choose and invite Account Designees.

A user's role determines what functionality they will have access to.

For more information on these user roles, please see the "WCMSAP Basic Functions for Account Managers" and/or the "WCMSAP Basic Functions for Account Designees" CBTs.

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After a successful login, the WCMSAP Home page (shown here) is the first page displayed.

To access WCMSA cases that were submitted through the Web portal and are associated to your ID, click Case Lookup.

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Slide notes

The Case Lookup screen will display. You may access WCMSA cases that are associated with your Login ID using various user-specified criteria.

Case listings may be requested for all cases (both submitted cases and work-in-progress cases), submitted cases only, or work-in-progress cases only.

The Web Portal also enables you to search cases by: Case Control Number, Health Insurance Claim Number (HICN), or Social Security Number (SSN).

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You may apply additional search filters to limit the number of cases displayed such as case creation date ranges (for Work-In-Progress cases) or case submission date ranges (for submitted cases).

A search for a maximum date range of 6 months at a time can be performed. There are no restrictions regarding the viewing of closed cases (as long as your user's ID is associated with the case). If a case is not found based on your search criteria, the system will display a NOT FOUND message.

If you attempt to search on an individual case to which you do not have access (i.e., your ID is not associated to the case), the system will present a message stating that you are not authorized to access the case.

Note: The system validates each data-entry field for accuracy and completeness. If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) were found.

When errors are discovered, the cursor shall be placed on the first field that generates an error condition. You must correct the error before the system will allow you to proceed.

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When you click on the Search button on the Case Look Up screen, the Case Listing page will display. This list will show all cases that met your search criterion, which are associated to your ID.

This page provides a summarized view of the case details, including: Case Number, Claimant Name, Date of Injury, Case Status, Case Location, Creation Date, Submission Date, and Case Access.

The Case Number is the Case Control Number which is assigned by the system. The Claimant is the name of the individual for whom the WCMSA has been submitted.

Date of Injury is the date of the work related injury or disease. Case Status is the current status of the case. It may be any of the following:

WIP (Work-in-Progress, case has been saved, but not yet submitted), Submitted (case has been submitted), PEND (case is pending),

 RECD (case has been received), REOP (case has been re-opened, after Regional Office (RO) has closed it), CLTR (closeout), ASGN (assigned), BUND (beneficiary under threshold),

CLOS (case has been manually closed), COMP (case completed), DECD (beneficiary has been flagged as deceased), DENY (case denied, unable to process case),

DEVP (in development), DISP (Workers' Compensation Recovery Contractor (WCRC) recommendation completed at RO), DREC (development received),

OPCM (case reopened after RO has completed the case), RTND (under threshold, non-beneficiary case, no CMS review), ZERO (zero set-aside),

APPR (approved). Note: A case status of "Approved" means that the RO has approved and is working the case; an Approval letter may not have been generated yet.

Once the RO has completed their review of the case, the user will receive an e-mail alert notification and they can go to the Alerts listing page and retrieve the approval letter.

Case Location is the current location of the case. This may be Submitter, WCRC, or RO, Creation Date is the initial date the case was saved as a work-in-progress,

Submission Date is the date the WCMSA case was successfully submitted, and Case Access allows Account Managers to manage access to the case by granting or revoking access for all active Account Designees under the given WCMSAP account.

To view the Case Summary for a case, click a case number link.

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The system will display the Case Summary page for the selected case. From this screen, you can access specific information related to the case using the tabs on the screen or by clicking on the View button for the page you wish to view.

The Beneficiary/Claimant, Diagnosis Codes, Workers' Compensation (WC) Carrier, Employer, and Documents tabs are denoted with an asterisk which means data is required upon case submission for those pages.

When you access those pages, the specific required data elements will be denoted by an asterisk. For more information on these tabs, please see the Case Submission CBT. The Attorney and Notes screens do not include any required data elements.

 For more information on how to upload or replace documentation for a case, please see the Uploading and Appending CBT.

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If you disagree with the RO's decision on a WCMSAP submitted case, you may submit a request to CMS to re-review the case.

A WCMSAP case is eligible for re-review when it is in approved status and a re-review has not already been requested.

Note: The [Request Case Re-Review] button will be disabled if the case is not eligible for the re-review request.

To request a re-review of a case, click the [Request Case Re-Review] button.

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The Case Re-Review Request page will display. The case number associated to the case being submitted for re-review is shown at the top of the page.

Select the request type: Medical, Rx (Pharmacy) or Both (Medical and Pharmacy). Next select the reason for the request: Option 1 or Option 2.

If you believe CMS's determination contains obvious mistakes (e.g., a mathematical error or failure to recognize Medical records already submitted

showing a surgery, priced by CMS, that has already occurred), select Option 1 and then upload supporting documentation and/or submit comments in the Additional Notes field.

Click the [Continue] button. However, if you believe you have additional evidence, not previously considered by CMS,

which was dated prior to the submission date of the original proposal which warrants a change in CMS's determination, select Option 2

and then upload your supporting documentation. Note: If you have selected Option 2, you are required to upload supporting documentation. Click the [Continue] button.
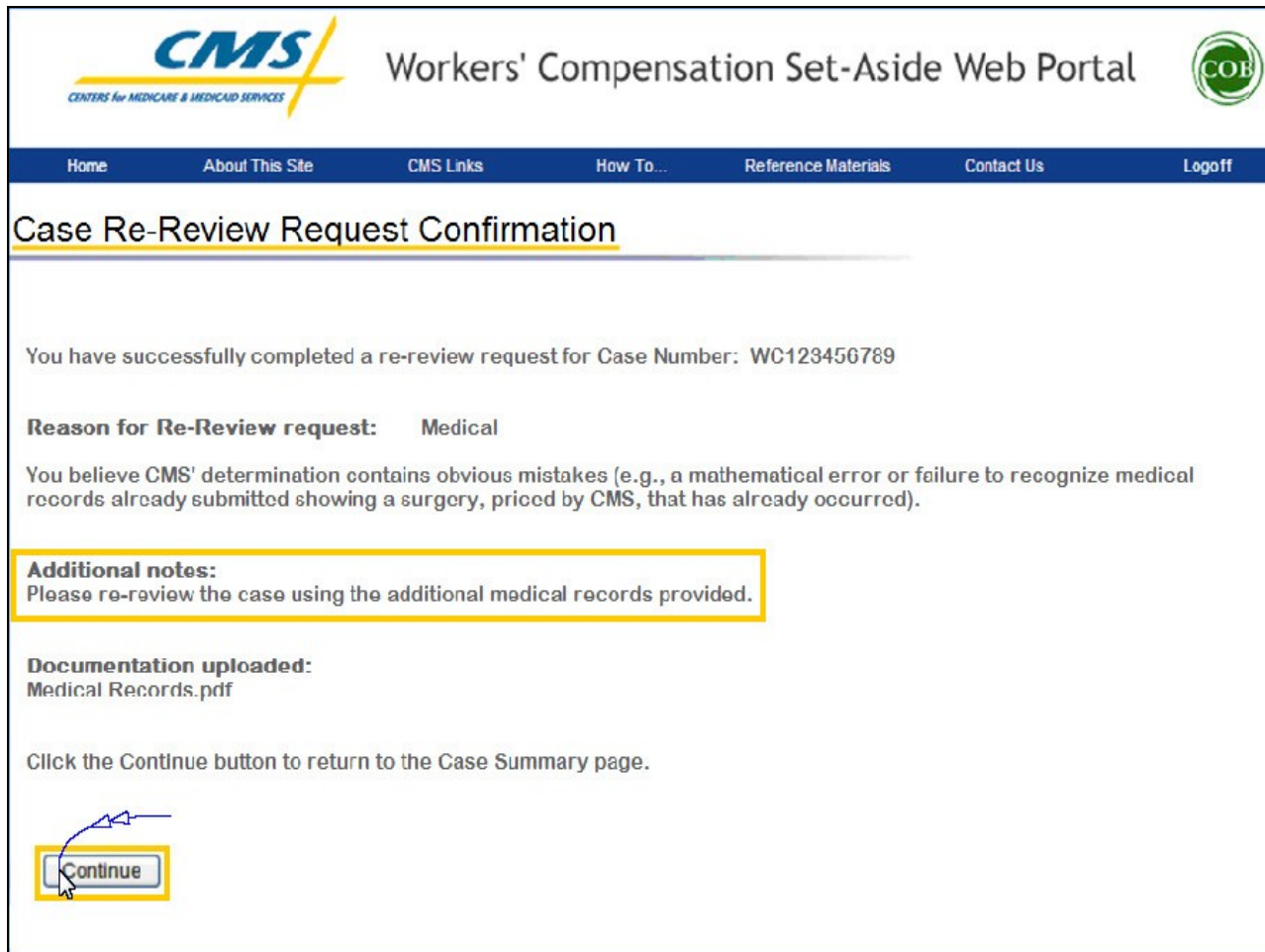
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The Case Re-Review Request Verification page displays after Option 1 or Option 2 has been selected.

Verify that the information provided is accurate. Click [Previous] to make changes.

If you wish to cancel the re-review request, click [Cancel]. All information for the Re-Review Request is discarded.

To proceed with the re-review request, click [Continue].

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The Case Re-Review Request Confirmation page displays. This page confirms that your re-review request has been submitted.

If you entered free-form text, it will be added to the permanent case and the case will be submitted for consideration.   Click [Continue] to return to the Case Summary page.

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When a re-review request has been submitted, the case is placed in DREC status indicating to the RO that documentation has been received on the case.

(Note: Case Status can be viewed on the Case Listing page).

The file name for each document that has been attached to the re-review request is displayed on the WCMSAP Case Document and Case Summary pages.

When the re-review process is complete, an e-mail Alert (Approval Letter) will be sent to the e-mail address provided during account setup.

The Alert (Approval Letter) will include the completed Re-Review Request attachment with the RO determination.

You can view the Alert by clicking the [View Alerts] link on the WCMSAP Home page or by going to the Case Summary page.

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From the Case Summary page, you can view any Alerts that have been received for the case by clicking the [View Alerts] button.

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Instead of the hardcopy letters currently generated in the Workers' Compensation Case Control System (WCCCS), the WCMSAP will generate e-mail alerts to the case submitter.

The system will automatically display all alerts/notifications associated with a case in descending date order, but you can re-sort the case in ascending order, by case, by date, by date within a case; and by case within dates.

For more information on Alerts, please see the Alerts CBT.

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Account Managers for Corporate and Representative accounts can grant or revoke Account Designees' access to specific cases under an Account ID.

 Please note: This option is only available to Account Managers. To grant or revoke access, the Account Manager can click the Manage Access link on the Case Listing screen.

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Once the Manage Access link/button is clicked, the Manage Case Access page will display all Account Designees assigned to the Account ID.

If the Account Designee currently has access to the selected case, the checkbox will be checked. If the Account Designee does not currently have access to the case, the checkbox will be empty.

To revoke access to a case, remove the check. To grant access, place a check in the box. Place a check in the Select All box to grant access to all Account Designees. Check the box again to revoke access from all Account Designees. After all changes are complete, click Continue.

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The following Designees have access to the case:

Designee Name

FIRST LAST

The Case Access Confirmation page will display, listing only the Account Designees with access granted to the case.

FIRST L

FIRST LAST

Case Listing

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The Case Access Confirmation page will display, listing only the Account Designees with access granted to the case.

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To exit the case, click Log Off. The system will return you to the Login Warning page.

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